

## SOAR Online Course: Adult Curriculum

### Practice Case Medical Summary Report (MSR)

Writing Tips from the SAMHSA SOAR TA Center

The goal of this activity in the SOAR Online Course is to make sure you understand the basic concepts of writing an MSR. We understand that this may be your first time completing an MSR, so we do not expect perfection. Because the Disability Examiner will never meet the applicant in person, it is critical to “paint the picture” of the applicant’s life, symptoms, and limitations in functioning.

### Getting Started and Gathering Information

#### **Review all of the information provided about your applicant in the case study materials**

- Gather information from all videos, progress notes, and treatment records provided
- Remember that information is dispersed throughout the Practice Case in Classes 1-4, simulating how you will receive information in real cases (bit-by-bit over time)
- As you gather information about your applicant, add to the related sections in the MSR template. This will help prevent you from duplicating your work
- Throughout the MSR, focus on making a connection between the applicant’s symptoms and limitations in functioning

#### **Formatting your MSR**

- Use the MSR Template (*provided in Class 1: Meet Your Client and on the [SOAR Tools and Worksheets](#) page of the SOARWorks Library*) to help organize your information
- Be sure to address every section. We are looking for complete paragraphs for each section of the report
  - Some sections like Personal History, Psychiatric History, and Functional Information will require more than one paragraph to adequately address all pertinent details

#### **Include Supporting Evidence**

- Quotes from the applicant, as well as family members, friends, previous employers, and case managers will help to strengthen your report
  - Including direct quotes is important for SSI/SSDI applications, as it is more helpful for the disability examiner to read the evidence as directly reported from the applicant and those who know the applicant best, rather than paraphrasing their words
- Cite the sources and provide quotes from the records when discussing past treatment, as this helps Disability Determination Services (DDS) to easily locate the information you are referencing in the included records

### Key Sections of the MSR

#### **Reviewing Personal History**

- Focus on discussing past trauma and how that trauma affects current symptoms and functioning
- Include quotes from the applicant to support your writing
- Discuss education history, including the last grade the applicant completed and any difficulties in school

### Documenting Past Employment

- Discuss dates of employment and tasks performed for all jobs
- Provide clear links between the applicant's symptoms and struggles with maintaining employment
- A quote from a previous employer or a support person will help to strengthen this section

### Addressing Substance Use and Materiality

- Your applicant has a significant history of substance abuse, so it is important to clearly illustrate that his or her use is not material to his or her disability
- Discuss what led to initial use, and how that use has progressed over time
- Cite substance abuse treatment records and any toxicology screens
- Focus on describing the applicant's symptoms and functioning during periods of documented sobriety (e.g. during treatment or while incarcerated)

### Treatment Provider Records

- Your applicant has received treatment from four providers. All four of these providers should be cited at some point throughout your report.
  - Remember that records from jail and substance use treatment providers may contain valuable information
- Reference records from all providers in the Psychiatric Treatment History section and/or other applicable sections (e.g., Legal History; Substance Use History)
- For each treatment provider, briefly summarize why the applicant received treatment, the diagnoses the applicant received, the doctors who provided treatment, the applicant's medications, and any quotes from the records that help document symptoms or functional limitations
- Remember to include quotes from the applicant about his or her symptoms in this section and throughout the MSR

### Comprehensive Functional Information Section

This accounts for 50% of the SSA listing criteria! All four areas of mental functioning must be addressed for every MSR. Class 5 has great examples of functional descriptions!

- Write at least one long paragraph for each area, providing multiple examples of the applicant's symptoms and limitations in functioning
- Clearly illustrate how symptoms of mental illness lead to limitations in functioning. (e.g., *Mr. Jones avoids shopping at the grocery store because he reports having panic attacks when he is in a confined space with strangers. He reports having panic attacks leading to crisis intervention services the last three times he attempted to shop for groceries.*)
- Include relevant quotes from the applicant, those who know the applicant best, and the records, when possible. Direct observations and examples from the clinical records will strengthen this section.

**Review sample MSRs:** <https://soarworks.prainc.com/article/sample-medical-summary-reports>

**Watch the MSR Tutorial Video:** <https://youtu.be/rS2v6z2iUKU>